

Age 18 Benefits Check-up for Transition Age Youth: A Guide for Students, Families and Professionals

July 2014

Instructions: This check-up should be conducted in the year following the 17th birthday for students and young adults who are receiving Social Security benefits based on disability. The purpose of the check-up is to identify and proactively plan for any benefits changes that may occur upon turning 18 years of age. A written summary of the results of this benefits check-up should be completed and sent to the student and family.

Different areas need to be checked depending on the type of Social Security disability benefits the student receives. For this reason, it is imperative that the beneficiary's current status be confirmed before conducting the check-up. The goal is to develop an individualized plan of action for each issue that is relevant for the student.

Issues for SSI Recipients

1. Have you discussed the SSI age 18 re-determination process with the student and family? Do they understand if the youth's disability does not meet the medical standard for adults, the benefits will cease? If the child is at risk of losing SSI after the age 18 re-determination, have you discussed the possibility of continuing benefits under Section 301 provisions?
2. If the student's SSI benefits were reduced due to parent-to-child deeming, have you discussed the changes in how parental support is viewed by Social Security when the youth turns 18? At that point, Social Security will apply the in-kind support and maintenance (ISM) rules instead of parent-to-child deeming. Have you discussed the various options for paying for food and shelter and how each of these may affect the SSI benefit? Also, if a PASS is in place before the youth is 18, and that PASS uses parental deemed income to fund

the occupational goal, the PASS may need to be amended because the income source has changed.

3. Have you checked to see if any other changes in unearned income are pending? For example, will there be changes in child support payments or arrangements? Have you discussed the fact that the one-third child support deduction does NOT apply once the student turns 18? Is an increase or decrease expected in other unearned income that needs to be planned for?
4. Will the student have access to countable resources (e.g. inheritance, personal or real property, cash settlements, etc.) upon reaching the age of 18 that could cause ineligibility? If so, does the student have plans to use these future resources? Would using a PASS to achieve a future goal be appropriate for these funds?
5. Have you discussed in detail the effect of earned income on the SSI check and Medicaid?
6. Have you discussed the use of specific work incentives such as the Student Earned Income Exclusion (SEIE), Impairment Related Work Expense (IRWE), Blind Work Expense (BWE) or PASS? Have you used the SSI calculation sheet to illustrate how varying levels of employment with applicable work incentives will affect the SSI cash payment?
7. Does the student have marriage plans in the near future? If so, have you discussed the effect of spouse-spouse deeming on SSI eligibility and payment? If the prospective spouse is eligible for SSI benefits, have you explained the eligible couple rules? Does the youth understand the different asset limits for married couples? Did you explain that a spouse's income or resources could make the youth ineligible for Medicaid?
8. Has the student been working? Does the student have sufficient work credits to establish SSDI eligibility? If the student doesn't currently have enough credits but may have in the next few years, have you explained the effect of receiving SSDI or other unearned income on SSI eligibility?

Issues for Title II Beneficiaries (includes SSDI, CDB, and Social Security child's benefits)

1. Is the student receiving a Title II child's benefit? Are the student and family aware of when this benefit ends and how participation in secondary education affects continued eligibility? Have you discussed the effect of work on child's benefits?

2. If the student was unable to establish eligibility for SSI due to excess income and/or resources, have you checked to see if CDB eligibility may be possible? If a parent is retired, disabled or deceased, encourage the family to apply for CDB payments upon the 18th birthday.
3. Have you explained the process for transitioning from child's benefits to the Childhood Disability Benefit program? Have you discussed the application process for CDB? Have you described how treatment of earnings differs between child's benefits and Childhood Disability Benefits?
4. If a parent's Social Security status has recently changed and the child is applying for a new benefit as a Childhood Disability Beneficiary, does the student understand that state Medicaid agencies may be able to exclude all or part of the CDB benefit in order for Medicaid entitlement to continue even after the SSI is ceased?
5. Does the student have marriage plans in the near future? If so, have you discussed the effect of marriage upon CDB eligibility? Benefits only continue if the person marries someone else who receives a Social Security benefit. Benefit entitlement stops if the marriage is to someone who is receiving child's benefits not due to disability, or just SSI benefits.
6. Has the student been working? Does the student have sufficient work credits to establish SSDI eligibility? If the student doesn't have enough credits yet, have you explained the effect of accumulating work credits over time on disability benefit status?
7. Have you discussed potential Medicare eligibility to the student and family? If SSDI or CDB eligibility is a possibility, have you explained the 24 month Medicare qualifying period?
8. Have you explained the effects of earned income on the Title II disability benefits? Does the student/family have a basic understanding of work incentives such as the Trial Work Period (TWP) and the Extended Period of Eligibility (EPE)? Have you explained how SGA determinations are made?
9. Have you discussed the use of specific work incentives such as Subsidy/Special Conditions, Impairment Related Work Expense (IRWE), or PASS? Have you explained how these work incentives may affect an SGA determination and what is involved in having these work incentives approved by SSA?
10. Establishing eligibility for a Title II disability benefit could affect the student's other public benefits. Have you checked to see whether a Medicaid waiver program is involved, or if the

student plans to apply for food stamps, HUD rental subsidies, etc.? If so, have you discussed the impact of work on these benefits?

Issues for Concurrent Beneficiaries (SSI and Title II benefits)

Go over ALL of the issues for BOTH SSI and Title II benefits shown above. When showing the impact of work, remember to check the Title II benefit status FIRST. These benefits represent unearned income, so the beneficiary needs to understand what happens with them in order to understand how the SSI benefit will be affected.

Also, have you discussed a PASS? People who receive both benefits may be very good PASS candidates, since the Social Security benefit may be set aside in the PASS.

Issues for Students Not Yet Receiving Social Security Disability Benefits

1. Has the student applied for SSI or Social Security disability benefits in the past? If so, what was the reason for denial? Does the student plan to reapply?
2. If the income or resources of the parents caused denial of SSI in the past, the student should consider re-applying immediately upon turning 18. Have you discussed the non-disability eligibility criteria for SSI with the student and family? Does the student have resource or income issues related that need to be considered before an application for SSI is made?

Issues Affecting All Students with Disabilities Regardless of SSA Benefit Type or Status

1. Turning 18 means that Social Security views the student as an adult. Will the student need a representative payee? Is legal guardianship an issue?
2. If a parent plans to act as the representative payee, does the parent understand their responsibilities in this capacity? If the parent wants to be payee because the student isn't used to handling money, have you discussed ways to build the student's money skills so that the student may eventually become his/ her own payee?

3. Have you reviewed events/information that must be reported to Social Security and how and when the reports should be made? Have you helped the youth and family members develop strategies for keeping receipts, keeping track of what benefits the youth receives and from whom, and when and to whom reports were made?
4. Is post-secondary education an option for the student? Have you discussed using a PASS to help fund this goal? Has the student initiated services with the state VR agency or EN?
5. Have you discussed the Ticket to Work program with the student and family members? Once the student turns 18 and eligibility for SSI as an adult is established, he/she will be eligible for a Ticket. You need to discuss what the ticket program is, what advantages ticket assignment provides and help with ticket assignment if needed.
6. Have you discussed long-term asset development strategies with the student and family? Are there Individual Development Accounts available in the student's area? Is home ownership a goal? Is business ownership a possibility in the future? If the student receives means tested benefits (including Medicaid waiver services) make sure you explain the impact of countable assets on such benefits.
7. Has the student and family thought about health insurance coverage long term? If the parents provide private health insurance for the student, this coverage might end at age 26. Have all Medicaid options been explored? If Medicare is an option in the near future, have the student and family thought about Medi-gap plans, Medicare Savings Programs for help with Part B, or the Medicare Part D prescription drug coverage?

Supplemental Security Income (SSI) and Age-18 Redeterminations

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What is the Age-18 Redetermination?

Passage of the Personal Responsibility and Work Opportunity Reconciliation Act (P.L. 104-193) in 1996 required that all Supplemental Security Income (SSI) recipients who turn 18 years of age must have their eligibility reviewed as if they were applying for adult SSI for the first time, without consideration of previous disability determinations. This review process is called the "age-18 redetermination" and it is performed because the childhood definition of disability varies greatly from the adult standard in the SSI program - with the adult standard being more stringent. Because of the way in which age-18 redeterminations are conducted, an individual can be determined ineligible for SSI benefits as an adult even though there has been no change in medical condition or ability to function since being found eligible for childhood SSI benefits.

IMPORTANT NOTE: The age-18 redetermination process only applies to SSI recipients. This is because the SSI program has two different definitions of disability – one for children under age 18 and one for adults aged 18 and above. Title II disability beneficiaries are NOT subject to redeterminations at the age of 18 since there is only one disability standard in the title II program.

The Age-18 Redetermination Process

The age-18 redetermination occurs for all childhood SSI recipients at some point after the 18th birthday. It may occur at a regularly scheduled Continuing Disability Review (CDR), or at another point as determined by Social Security. In general practice, the age-18 redetermination usually occurs within 12 months after the 18th birthday, although this is not required by

regulation. Cases should not be initiated prior to the month before the month the individual attains age 18. An age 18-disability redetermination should never be initiated if the individual wasn't eligible for SSI in the month before the month of the 18th birthday.

The process for conducting redeterminations at age 18 includes both the gathering of information on the young adult and determination of eligibility under the adult criteria for SSI. Age 18 redeterminations are considered to be initial eligibility decisions rather than Continuing Disability Reviews or CDRs. This means that the Medical Improvement Review Standard (MIRS), which is used in conducting CDRs, is not used for the redetermination. When the MIRS is applied, the burden of proof falls on Social Security to document that medical improvement has occurred. Without the application of the MIRS, the burden of proof lies with the individual in establishing that the adult disability criteria for SSI are met. Consequently, there is a heightened need for youth, their families, school personnel, and others to provide accurate and up-to-date documentation and evidence related to the disabling condition and the person's ability to function and work. The general process is as follows:

1. Written Notification of Redetermination

The local Social Security Field Office begins the process by sending written notification to the individual and parents/guardians that the case will be redetermined. A copy of this initial notice is provided at the end of this document in the "Conducting Independent Research" section.

2. Interview at Social Security Field Office

The young person and his/her family members, guardians, or representatives typically go to the local field office to complete an initial eligibility interview. The purpose of the interview is to gather information on the severity of the disability and how it affects the person's ability to function. During the interview, Social Security personnel will complete the appropriate initial disability interview forms including Form SSA-3367-F4 (Disability Report Field Office), Form SSA-3368-BK (Disability Report-Adult), and appropriate disability and functional reports. Social Security also requests permission to contact physicians, service providers, and teachers who work with the individual. The individual will be asked to sign Form SSA-827 (Authorization for Source to Release Information to the Social Security Administration) for each source of information.

IMPORTANT NOTE: Social Security personnel are specifically instructed to ask the individual if he/she is receiving vocations rehabilitation, employment, training, educational, or other support services from any source during the redetermination interview. The answer provided to this question is critically important because it indicates the potential for section 301 continuation of benefits if an adverse determination is possible.

3. Review by the Disability Determination Service (DDS)

All the information gathered at the interview is forwarded to the state Disability Determination Services or DDS. This is a state agency that reviews medical and non-medical information to determine if the individual is or is not disabled under the law. DDS follows a detailed process (known as the sequential evaluation process) to determine if the youth's impairment is "severe" by Social Security's criteria. Keep in mind that the criteria to receive the label of "severe impairment" are more stringent for adults than for children in the SSI program.

The DDS also examines the individual's ability to earn income in future employment by reviewing information gathered from the young adult's teachers regarding his/her abilities. Due to the limited opportunities for community work experiences for adolescents with disabilities, the information gathered often relates more to an individual's performance in school without consideration to their ability to perform in actual work environments. The lack of information on true work performance often leads to an inaccurate assessment of an individual's future ability to earn income.

4. Individual is Notified of the Determination

A written notice is sent to all individuals who have an age-18 redetermination conducted. If the determination is favorable, the individual continues to receive SSI cash payments and Medicaid with no interruption.

An individual who is NOT determined eligible for SSI benefits as an adult will get a written notice stating that he/she is no longer qualified to receive benefits. These individuals are entitled to receive two more months of payments after the date of this notice. Overpayment may occur if an ineligible individual continues to receive payments after the two-month grace period. The good news is that individuals found ineligible under the adult rules, are NOT required to pay back of all SSI payments received after the 18th birthday month. Social Security will only seek to recover those payments received after the determination is made and the two grace months are over.

IMPORTANT NOTE: When initiating an age-18 disability redetermination involving a concurrent claim, Social Security personnel are required to advise the individual that an unfavorable determination on the disability redetermination would trigger a CDR on the title II claim.

Strategies for Managing the Age 18 Redetermination

While there is nothing a childhood SSI recipient can do to avoid the age-18 redetermination process, there are several strategies that students, parents, teachers, WIPA project personnel, and other professionals can apply to make sure that the age 18 redetermination process is as accurate and fair as possible.

Strategy 1 - Educate Young SSI Recipients and Their Families about the Age 18 Redetermination Process

A significant problem related to the age-18 redetermination is that SSI recipients and their families typically have no idea that this process occurs, nor how it differs from the regularly scheduled CDRs. First and foremost, students, families, school personnel, and VR staff should be given detailed, understandable information about the redetermination process and how it works. In particular, the CWIC must discuss how information will be gathered that contributes to the part of the redetermination that examines the recipients' future ability to earn income through paid employment.

Strategy 2 - Identify Individuals Most at Risk of Benefit Loss upon Redetermination

It is important to understand that not all childhood SSI recipients are at risk of losing SSI eligibility during the age-18 redetermination process. Youngsters with the most severe disabilities are most likely to meet the more stringent adult disability criteria and would have little to fear from the redetermination process. Unfortunately, the age-18 redetermination process impacts youth with certain disabilities more than others. For example, students with certain behavioral, respiratory, endocrine, and cardiovascular disabilities tend to be more likely NOT to meet the adult disability standard than other youth. In addition, students who were required to appeal their initial SSI medical determination in order to be awarded benefits as children may logically be assumed to be at risk during redetermination since they struggled to meet even the less stringent child's standard. Finally, youngsters who have experienced an improvement in their medical condition since their last Continuing Disability Review may also be at risk of an adverse redetermination.

It is important to identify which youth may be at risk of an adverse re-determination in advance of the review so that a contingency plan can be developed in case SSI eligibility is lost. Being prepared in advance may make the difference between having a gap in critical benefits and health insurance and having benefits either continue unabated, or having alternate sources of support in place.

Strategy 3 - Start Planning Early for the Age-18 Redetermination

Schools and other involved professionals should provide students and families with detailed, understandable information about the redetermination process during the earliest stages of transition planning. At the very least, planning should occur during the 17th year. Specifically, the following points should be addressed early on:

- Discuss how information will be gathered that contributes to the medical review under the more stringent adult disability standard. Gather contact information for various doctors, therapists, disability professionals, teachers, or others who have information to share on how the young person functions.
- Discuss how information will be gathered that contributes to that part of the redetermination process examining the individual's future ability to earn income through paid employment.
- Develop a contingency plan if the potential for loss of SSI benefits and Medicaid exists. This should include alternative plans for meeting the young adult's anticipated support needs for work or community living that are currently tied to SSI eligibility and receipt of Medicaid.
- It is possible that disability benefit payments may continue for a limited period of time even though the student is not found to meet the adult definition of disability if eligibility can be established for "section 301" status. Section 301 is a phrase which refers to several parts of the Social Security Act that allow continued disability payments to be made to certain individuals who have medically improved – meaning they no longer meet the disability standard – under certain prescribed circumstances. Since section 301 status is contingent upon meeting several important criteria when the redetermination is performed, it needs to be prepared for in advance! More detailed information on section 301 provisions is provided below.

Strategy 4 – Help Involved Parties Understand How Past or Current Work Affects the Age-18 Redetermination

Fear of the age-18 redetermination process creates significant uncertainty regarding the impact of work/earnings on the disability determination. Many young people and their families are under the mistaken impression that SSI recipients must not be working at any level when the redetermination occurs. In fact, the Substantial Gainful Activity (SGA) step of the sequential evaluation process does not apply to these disability redeterminations. This means that a youth may be employed above the current SGA guideline and still be found eligible for SSI under the adult rules during the age-18 redetermination as long as the disability standard and all other SSI eligibility criteria are

met. There is no reason to hold back on paid employment until after the student successfully completes the age-18 redetermination. There is no reason not to engage in paid employment before, during or after the redetermination!

Documentation from teachers and rehabilitation professionals is used to determine the individual's potential to earn income through work. Frequently, the Social Security forms only include questions related to school performance. If the student has participated in community based work experiences, supplemental documentation should be provided that states the level of performance in these settings and what supports are required to perform work activities. The SSA-5665 Teacher's Questionnaire can be found online at Social Security's website: [SSA 5665- Teacher's Questionnaire](#)

Strategy 5 – Help Involved Parties Understand the Purpose of Questions Asked by Social Security

Teachers and others who provide information for redetermination should understand those questions attempting to identify prior fraud or misuse of benefits by families. They should consider the questions carefully, clearly understand what they are communicating by their responses, and be certain that the observations providing the basis for their answers are accurate.

Strategy 6 – Be Prepared to Request Continuation of Benefits under Section 301

CWICs must remember that disability benefit payments may continue even though the young person is not found to meet the adult definition of disability if eligibility can be established for "section 301" status. Payment of benefits under section 301 requires that the beneficiary be actively participating in an approved vocational rehabilitation or be receiving special education services under an IEP prior to the adverse disability determination. For youth under age 22, Social Security assumes that continued participation in educational program under an IEP is likely to result in permanent removal from the disability rolls.

Prior to June 25, 2005, payment of benefits under section 301 was highly restrictive. It required that the beneficiary be actively participating in an approved vocational rehabilitation program before the determination of ineligibility was made and Social Security had to determine that continued participation in the VR program was likely to result in permanent removal from the disability rolls. Social Security revised regulations in two important ways that made section 301 provisions of tremendous value to youth with disabilities.

First, under the old regulations, an approved program only included participation in the Ticket to Work and Self-Sufficiency Program with an approved Employment Network (EN), a state VR program, or other programs of VR or employment services. Under the new regulations, an approved program may also include participation in school for students aged 18 to 22 as long as the student receives services under an Individualized Education Plan (IEP) or an Individualized Transition Plan (ITP). Participation in the educational program is defined as taking part in activities or services outlined in the IEP/ITP.

Second, under the old rules, Social Security was looking to see that the VR program would provide transferable work skills or experience so the person's vocational capability would support a decision of "not disabled". In other words, would completing the VR program result in the likelihood that the individual would be permanently removed from the disability rolls? Under the new regulations, for students aged 18-22, Social Security simply assumes that continuation in the program of special education will increase the likelihood of permanent removal from disability rolls. This makes the "likelihood" decision a great deal easier and simpler.

WIPA project personnel need to understand that most VR counselors and school personnel are not aware of the section 301 provisions. Students at risk of termination due to the age 18 redetermination need to receive information about section 301 continuation of benefits from a very early age! These students will need to access vocational rehabilitation services or must continue to stay in school and receive education services under an IEP/ITP in order to use section 301 protections.

The CWIC may need to keep a close watch on youth undergoing an age 18 redetermination as DDS does not always identify those who may be eligible for section 301 benefits. The CWIC may need to act as a coordinator to facilitate a successful section 301 determination since the local Social Security Field Office may not have experience with these rather rare cases and the other involved parties (state VR agency, private VR provider, and school) may not know this provision exists.

Strategy 7 – Provide Information about the Appeals Process to Youth who are Determined Ineligible

An individual who is dissatisfied with the disability redetermination under the age 18 provisions of the law will have all normal appeals provided for disability cessations in CDR cases, including the Disability Hearing Office (DHO) hearing. Individuals who appeal an age-18 redetermination are also permitted to retain cash benefits while the appeal is heard if the appeal request is submitted within 10 days of the notice. Individuals need to understand that if the appeal does not result in a favorable decision, the payments received since the date of the original determination will be subject to recovery.

All those involved in the transition process should encourage the youth and their families to file a formal appeal to Social Security if redetermination results in a loss of benefits. Involved professionals can also help in documenting additional evidence for the appeal process. While CWICs are not permitted to represent individuals during an appeal, they should assist by providing information about the appeals process. At present, the American Bar Association provides referrals to attorneys who will help children and youth with disabilities through both the redetermination and appeals process.

IMPORTANT NOTE: It is possible to appeal the original redetermination decision and request continuation of benefits under section 301 simultaneously. If section 301 requirements are met, CWICs are advised to recommend that the individual request continuation of benefits under these provisions. If the individual disagrees with the disability determination, an appeal may also be filed.

If the adverse determination is upheld upon appeal, the individual will still be permitted to retain SSI benefits under section 301 as long as the criteria for this provision are met. If the determination is overturned upon appeal, regular SSI payments will be reinstated and there will have been no interruption of cash payments or Medicaid coverage.

Conclusion

The age-18 redetermination represents a critically important transition point for young people who receive SSI as children. Unfortunately, many SSI recipients, their family members and teachers are completely ignorant about the age 18 redetermination process and do not prepare themselves for the potential consequences of these reviews. The WIPA projects have a significant role to play in educating concerned parties about the age 18 redetermination process and how to manage this process in order to minimize adverse impact.

Conducting Independent Research

POMS DI 11070.000 Title XVI Childhood and Age 18 Disability Redetermination Cases (Public Law 104-193 as Modified by P.L. 105-33) FO

POMS DI 33025.075 Age 18 Redetermination Cases Under P.L. 104-193

POMS DI 23570.010 Disability Redeterminations - Age 18 Cases

Form SSA-5665 Teacher's Questionnaire. Found online at: [SSA 5665- Teacher's Questionnaire](#)

Student Earned Income Exclusion Factsheet

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The Student Earned Income Exclusion (SEIE) is a work incentive that allows certain SSI recipients who are under age 22 and regularly attending school to exclude a specified amount of gross earned income per month up to a maximum annual exclusion. The Student Earned Income Exclusion (SEIE) decreases the amount of countable earned income, thus permitting SSI recipients to keep more of the SSI check when they work. In many cases, the SEIE allows students to test their ability to work without experiencing any reduction in the SSI check at all.

Who is eligible for the Student Earned Income Exclusion?

Currently, individuals may qualify for this income exclusion as long as they are under age 22 and a student regularly attending school, college or training to prepare for a paying job. In the past, individuals had to meet Social Security's definition of a "student child" which meant the individual could not be married or the head of a household. Effective April 1, 2005, Public Law 108-203 (the Social Security Protection Act) eliminated the requirement that an individual need be neither unmarried nor the head of household in order to qualify for the Student Earned Income Exclusion.

In addition, Section 432 of the Social Security Protection Act extended the Student Earned Income Exclusion (SEIE) to all individuals on a record who are working students under the age of 22, not just those who meet the SSI definition of a child. This means that the SEIE applies to earnings deemed from an ineligible spouse or parent(s) and to the joint earned income of eligible couples when both members are under age 22 and are working students. This represents a significant expansion of this provision.

What does “regularly attending school” mean?

Regular attendance means the individual takes one or more courses of study and attends classes:

- in grades 7 - 12 for at least 12 hours a week; or
- in a college or university for at least 8 hours a week under a semester or quarter system; or
- in a course of training to prepare him/her for a paying job for at least 15 hours a week if the course involves shop practice or 12 hours a week if it does not involve shop practice. This kind of training includes anti-poverty programs, such as the Job Corps and government-supported courses in self-improvement.

In some cases, Social Security will consider an individual to be regularly attending school even if they spend less time in school than indicated above. If the reason for spending less time in school is beyond the student's control and if the circumstances justify the reduced credit load or attendance, Social Security may still allow the student to apply the SEIE. Examples of circumstances that would meet these requirements might include illness or unavailability of transportation.

Prior to December 18, 2006, an individual who was being home schooled, but was not homebound, did not meet Social Security's definition of a student. However, effective December 18, 2006, an individual may be a student regularly attending school when he/she is instructed at home:

- in grades 7 – 12,
- for at least 12 hours per week,
- in accordance with the home school law of the State or other jurisdiction in which he/she resides.

An individual may also be a student regularly attending school when he/she:

- has to stay home because of a disability;
- studies a course or courses given by a school (grades 7 - 12), college, university, or government agency; and
- has a home visitor or tutor from school who directs the studying or training.

How is the Student Earned Income Exclusion applied?

The SEIE is applied to a student's gross wages or net earnings from self-employment before any other allowable exclusions. In 2014, the Social Security Administration (SSA) will exclude all gross earnings up to a maximum of \$1,750 per month until the full annual exclusion of \$7,060 is exhausted, the individual reaches age 22, or the individual is no longer a student. The annual SEIE maximum applies to the true calendar year that begins in January and ends in December. It is not possible to apportion the amount of the SEIE applied in a given month. All earnings

received in a month up to the current monthly maximum will be excluded as long as the annual maximum has not been reached.

The Student Earned Income Exclusion is applied directly to gross wages or net earnings from self-employment before any other deductions or work incentives are applied. The SEIE may be used in addition to other work incentives such as impairment related work expenses, blind work expenses, or a plan for achieving self-support as long as income remains to be excluded after the SEIE has been applied.

As of January of 2001, SEIE amounts are indexed annually, meaning they go up (or at least remain the same) each year in January. In future years, the monthly amount and the yearly limit will be adjusted annually based on any increases in the cost-of-living index. SEIE amounts for all prior years are shown in the following chart:

For Months	Maximum Exclusion Per Month	Maximum Annual Exclusion
In calendar years before 2001	\$400	\$1,620
In calendar year 2001	\$1,290	\$5,200
In calendar year 2002	\$1,320	\$5,340
In calendar year 2003	\$1,340	\$5,410
In calendar year 2004	\$1,370	\$5,520
In calendar year 2005	\$1,410	\$5,670
In calendar year 2006	\$1,460	\$5,910
In calendar year 2007	\$1,510	\$6,100
In calendar year 2008	\$1,550	\$6,240
In calendar year 2009	\$1,640	\$6,600
In calendar year 2010	\$1,640	\$6,600
In calendar year 2011	\$1,640	\$6,600
In calendar year 2012	\$1,700	\$6,840
In calendar year 2013	\$1,730	\$6,960
In calendar year 2014	\$1,750	\$7,060

What happens to the SEIE over vacations or the summer break?

An individual remains a student for the purposes of the SEIE when classes are out if he/she actually attends classes regularly just before the time classes are out and:

- tells Social Security that he/she intends to resume attending regularly when school reopens; or
- actually does resume attending regularly when school reopens.

For most students, this would allow the SEIE to be applied to summer employment when school is not in session. When an SSI recipient graduates from school and does not intend to resume school later, the SEIE will apply for the last month during which school was attended, then stop. When a student changes his/her intent to return, and does not return to school, the individual is no longer considered a student effective with the month the intent changed.

How does Social Security know whether student child status applies?

Social Security verifies student status during the annual SSI re-determination process. School enrollment may be documented by presenting a school record such as an ID card, tuition receipt, or other comparable evidence. If the individual does not have any evidence to present, Social Security may contact the school to verify attendance. If Social Security is aware of the child's student status, the SEIE generally will be applied automatically when earnings are reported. However, it is recommended that student status be clearly indicated in writing when notifying Social Security of employment. There is no special form or process needed to request the SEIE.

